FOOD STAMP ERROR REDUCTION COMMITTEE
May 20, 2002
Meeting Minutes

Members Present
Marcia Williamson; Pat Woldt; Edie Sprehn; Tom Prete; Jacaie Coutant; Mike McKenzie; Maxine Ellis; Kathy Judd; Staci Wanty; Christina Martin; Lisa Hanson; Jackie Bennett

By Phone: Lorie Mueller

1. Power Point Presentation – Tom
Tom completed the first draft of the PowerPoint presentation in the wee hours of the morning and emailed it to all committee members. He ran the demo in its entirety to get preliminary reaction from those present at the meeting. The presentation is divided into the following separate segments that can run independently of the others, allowing the worker to determine which are used in the interview. FS Program Overview
- Application Process
- Reporting Changes
- QUEST Card
- Work Programs – FSET

Each segment displays the number of minutes it takes to run through it and the total for all segments is 17 minutes. Once a segment begins, it runs without further assistance. This enables the worker to begin the display and leave the office without the need for the client to touch the computer. A preliminary test was run with a few Dane County workers who found it very useful.

Tom stated he developed the package on the basic premise that it was not intended to extend the interview but to be used during the time that the worker attended to other interview activities (e.g. making photocopies, etc.). He further stated that the package is not intended to replace all of the information the worker must give the customer, but rather give a summary of information, focusing primarily on change reporting requirements.

After review of the demo, some of the initial comments include:
- Convert the presentation to other languages
- Add narration for computers that have speakers
- Look at the speed of the screens to allow sufficient time for the client to read each item
- Enable the worker to stop the presentation if needed.
- Change the $200 and $300 asset limits to the correct amounts

➢ **Action Step**: Committee members should continue to review the package and send Tom any suggestions for changes in content or wording. He will re-send another draft to be tested by some ES staff.

2. IMAC Restructure and New CARES/IT Committee – Jackie
Jackie distributed a carefully handcrafted depiction of the structure of the Income Maintenance Advisory Committee and its Subcommittees including a new committee

entitled "IT/CARES User Group."   This group would provide input to DHFS related to CARES priorities and schedules. A document listing proposed assignments related to issues identified by the IM Workload Study Committee was also attached.

3. **Error Reduction Proposals: 2003 IM Contract – FS Agency Preventable Errors & High Performance Bonus, and Fraud and Error Reduction Incentive Funding for Local Public Assistance Agencies – Jackie**
    Jackie distributed two documents presented to IMAC. IMAC members requested the FS Error Reduction Committee review the proposals and send a response to Ed Kamin, IMAC committee chair. The committee briefly discussed the QA APE and high performance bonus IM Contract proposal and its potential impact.

    ➢ **Action Step:** Committee members should review both documents and send comments to Jackie Bennett (email jbenn@racineco.com) by June 6, 2002. Jackie will coordinate the response through emails to the committee members and then forward the final document to Ed Kamin.

4. **Error Rate Report – Mike**
    Reports are now on line from Data Warehouse. Data is complete through January. Error rate from 10/01 – 01/02 is 12/2%.   November was unusually high at 22.1%.

5. **Error Reduction Grants – Lisa**
    Lisa gave a brief report regarding the status of the grants. DWD contract staff are in the process of putting the grants into the IM Contract for counties who will be awarded them. There are some technical issues related to the fact that the time period to spend the money will span two contract periods. Official notice will be sent to each county along with the contract addendum.

6. **Reporting Requirements Survey – Pat**
    Pat reported on the results of the client survey conducted by QA reviewers. Two Milwaukee reviewers failed to use the survey in April, so they are conducting their survey in May. Their responses should be in within a couple of weeks. Pat will add their findings to the rest.

    Generally, the survey gave some insight into how information related to reporting changes is both given by the worker and received by the client. The survey revealed some common elements:
    ▪ Some thought the intake interview seemed rushed
    ▪ There were several comments about the need to have all documents in multiple languages
    ▪ Written information was hard to understand
    ▪ Many don't read the handouts.

    ➢ **Action Steps**: Pat will add the additional responses from the Milwaukee QA Reviewers to the document. The final document will be shared with IMAC. It will also be used to target other error reduction activities for the committee. A suggestion was made to conduct a follow-up survey in about a year.

7. Supervisor Forum – Mike

Question was raised as to whether another supervisory forum should be held again this fall. Evaluations were good and there is likely to be interest from local agency staff. The locations of Waukesha, Stevens Point and Cable seemed to accommodate agency needs. ONSPI will look at setting up another this year.

8. Power Posters – Staci

Due to technical difficulties related to color printing, obtaining bids, etc, it was determined that the posters could not be out in May. It was determined this project would not be feasible as planned.

9. Client Advisory Posters – Lisa

1500 of these posters went to print and will be delivered to local agencies. Christina suggested the posters be distributed through regional supervisors meetings.

10. Follow-up Letter – Mike

A request has been created in CARES. No programming or time frame has been completed for this. This will be implemented in two phases – the first manual in which the worker must send out the letter. The second fully automated.

11. Investigative Interviewing Workshops by Tim Gard – Lisa & Mike

A contract is in place for Tim Gard to conduct a series of workshops statewide for staff on Investigative Interviewing. There was much discussion related to how many workshops should be conducted, the dates, the workshop length, locations and whether the workshop should be mandatory or optional. With the increase in workload and decrease in staffing levels, some agencies may find it difficult to schedule staff without affecting agency operations. Lisa had a conference call scheduled with Tim and would be discussing scheduling issues.

12. Alerts – All

The committee discussed a strategy related to the alerts issue. Although there were several approaches to addressing the entire alerts issue, Mike requested we focus specifically on the alert issues raised at the WCHSA Symposium:

- <u>When action has been taken on alert – get rid of it</u>: Committee members identified that some alerts drop off after a particular time period whether action is taken or not, some disappear when the action is taken, some stay whether action is taken or not and must be deleted when the action is taken.

  - ✓ Further information is needed from CARES staff to know which alerts fall into the above categories.
  - ✓ Alerts for the last category should be automatically removed when the action is taken.
  - ✓ Workers also need to refresh knowledge on what action will result in completing the activity on an alert. For example, crossmatch alerts require the disposition to be completed on the match in addition to the income entry (SSI/SSA, etc.)
  - ✓ CMCR should have the capacity to hold a sort request.

- ▪ <u>Eliminate alerts generated by querying screens</u>: This is a valid concern. Queries often result in alerts to run ED/BC which adds to the confusion regarding the importance of this alert.

  - ✓ Further information is needed from CARES staff to know which screen queries result in the alert and what types of alerts are generated.
  - ✓ Alerts should be generated only when a screen is updated.

- ▪ <u>Give us only alerts that affect the case</u>: There was much speculation about what this statement means. Speculation ranged from receiving information and data exchange for non assistance group members, to changes in income that do not result in a change in benefits once they are applied.

  - ✓ Further information is needed regarding the specific scenarios with this issue.

- ▪ <u>Create a "worker profile" that can be defined by each agency to allow for certain type workers to receive specific alerts – similar to the KIDS work list</u>: This suggestion would add another layer of complexity to already complex security levels. It also sounds as if this is a request to accommodate individual agency operations through specialized worker functions which is beyond the scope of immediate alert concerns. (Jackie will draft a response to this issue.)

  - ✓ Initial phase of alerts changes should focus specifically on enhancing the worker's ability to manage a caseload.
  - ✓ To accommodate the individual worker, CMCR should be reviewed to determine if there are other types of alert sorts or additional sort capabilities.
  - ✓ As a potential resolution to his issue, an alternative to creating a specialized worker profile might be to allow a CMCR sort on all cases in an office rather than limiting to just one caseload.

- ➢ **Action Steps**:
  1. Jackie will draft a response to the "worker profile" issue.
  2. Mike will submit a preliminary response to the four points itemized in the Workload Symposium summary, requesting further information in some instances.
  3. Mike will draft an Alerts work plan format to: itemize the issue, time frame, individual responsible and status.
  4. Lisa will see if she can get a copy of the FS Error Prone spread sheet developed by Marsha Bush and email it to committee members
  5. For the entire committee: Long term action needed in a comprehensive review of all alerts would be to identify where each alert comes from, eliminate outdated alerts, review priority status, revise wording, and attach each alert to the applicable program(s). A resource from CARES will be needed to accomplish this step.

13. June 24th Agenda Items

- Review and approve minutes from both 4/22 and 5/20 meetings
- Error rate data
- Update on Client Reporting Requirements Survey
- Update on PowerPoint Study
- Ongoing Project Reports
- The Continuing Saga of Alerts

Handouts Given at the Meeting

- PowerPoint presentation – received individually by email on 5/20
- IMAC Committee Structure and Follow-up Issues Identified by IM Workload Study Committee
- 2003 IM Contract FS Agency Preventable Errors & High Performance Bonus
- Fraud & Error Reduction Incentive Funding for Local Public Assistance Agencies
- FS Error Summary
- Reporting Requirements Survey
- (Used as Reference) – Strategies to Reduce FS Errors (Position Paper), CARES Alerts List from New Worker Central Library, Workload Symposium Summary

Joanne Ator is scheduled to do the minutes for the next meeting.